

# Portfolio Research & Operations

## Institutional Asset Manager

**\$1.4m**

in annualized savings

**80%**

faster turnaround time

Pooled resourcing  
structure

Centralized solution for  
standardized analytics

### CLIENT CHALLENGES

- » The board of the client engaged a global consulting firm to identify the right partner to accelerate its strategic growth plan
- » Acuity Knowledge Partners was selected to provide knowledge services after a rigorous selection process
- » As part of this mandate, the client required Acuity Knowledge Partners to perform performance and risk analytics for its investment division teams
- » The client also needed Acuity Knowledge Partners to create an advanced analytics framework for its existing performance measurement, investment risk assessment, portfolio attribution capabilities, manager research, data management and client reporting

### OUR APPROACH

- » Deployed a 25-member team of domain specialists knowledgeable in MATLAB, R, C#, Excel and VBA and proficient in FactSet, Barra and Axioma systems
- » Customized reports for each asset class across global teams to best suit portfolio managers' requirements
- » Ensured centralized report production and, wherever possible, standardized templates
- » Integrated advanced risk analytics platforms – Axioma and Barra – with client systems
- » Fully automated the process of producing and distributing reports based on FactSet Portfolio Analytics, Dashboard and Batchter
- » Managed data flow across multiple databases and assisted in the manager/benchmark transition process
- » Developed and maintained tools for internal client needs

### IMPACT DELIVERED

- » Reduced the turnaround time of scheduled analytics – 80% faster (T+2 vs. T+10 previously)
- » Saved \$1.4m in annualized costs
- » A pooled resourcing structure helped inter-connectivity across various teams within the investment division
- » Delivered an end-to-end solution across different phases of the portfolio life cycle
- » Provided access to domain specialists for custom analytics support

#### About Acuity Knowledge Partners

Acuity Knowledge Partners, formerly part of Moody's Corporation, is a leading provider of bespoke research, analytics, staffing and technology solutions to the financial services sector.

Headquartered in London, Acuity Knowledge Partners has nearly two decades of transformation experience in servicing over 300 clients with a specialist workforce of over 2,500 analysts and delivery experts across its global delivery network.

We provide our clients with unique assistance not only to innovate, implement transformation programmes and increase operational efficiency, but also to manage costs and improve their top lines.

These services are supported by our proprietary suite of Business Excellence and Automation Tools (BEAT) that offer domain-specific contextual technology.

Acuity Knowledge Partners is assisted by Equistone Partners Europe, a leading private equity organisation that backs specialist growth businesses and management teams.